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ABSTRACT

Boards of education often feel that consultants are high-priced or of questionable quality; however, reasonably priced, highly competent consultants are available. Some issues facing school districts can best be approached using the specialized talents and objectivity available only from consultants. When a school board has decided that it needs a consultant, it should seek recommendations on who should be hired. The names of good consultants quickly emerge with strong endorsements from prior clients. The next step is to follow up on the recommendations by checking references and resumes. When the list of prospective consultants has been narrowed to two to four candidates, interviews should be scheduled. The candidates should be asked to prepare a detailed outline of their proposal. When a final selection has been made, the proposal should be reworked into contract form with someone from the board acting as the official contract person. Some portion of the fees should be designated for payment only after the final report has been accepted. Consultants can be a valuable resource if thoughtful planning is used in their recruitment. (DC)

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HOW TO FIND AND USE A GOOD CONSULTANT

Robert W. Heller

Finding and using a good consultant is, like many things, a relatively easy thing to conceptualize but often difficult to pull off. Paramount of course in the process is the need to identify that a task or problem exists that warrants the utilization of outside expertise and talent. All too frequently boards of education frown on the use of consultant assistance without thinking through the entire process. They have heard or read somewhere that consultants are "all" high priced or offer questionable quality of service. Certainly there are differing levels of quality and competence of consultants whose fees will range widely. The reality is, reasonable highly competent consultants are available. Additionally, there are tasks or problems facing school districts which often can best be addressed using the specialized talents and objective approach only available from consultants. Some issues are highly emotional, such as possible closing of a school or reorganization of a school district. Other issues are quite complex and require a great deal of expertise and objectivity such as the selection of the new superintendent of schools.

Boards of education find the tasks associated with the superintendent search procedure to be quite different than those normally encountered in school board affairs. This

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fact, coupled with the significance of the position to be filled, makes necessary a careful and comprehensive program of recruitment and selection. In instances such as these, it is highly advisable to go to experts outside the school districts. Consultants do not have to be restrained by insider vested interests or political considerations. Reports, studies and other consultant services can provide an air of creditability often times not given to inhouse produced services.

In my role as a university professor of educational administration, I am frequently provided with opportunities to serve in the role of consultant. Most notably are my activities in assisting boards of education in the superintendent selection process having worked with over fifty-five school districts during the past sixteen years. I have also served as a consultant to school boards in superintendent/school board relationships, in declining enrollment studies, staffing studies and administrator/teacher evaluations. Consequently, the perspective that I present in this discussion will be that as seen through the eye of the consultant.

Selection of the Consultant

Once the school board recognizes the importance of securing specialized assistance, it is faced with the problem of finding and securing a competent consultant(s). The Superintendent of Schools can play a valuable role in this

process by recommending to the board capable consultants that he/she has knowledge of or by checking with other school districts who have used consultant help for recommendations.

The possibility of engaging a person of inexperience or mediocre competence is quite real if a thorough search process is not undertaken. There is no accrediting agency or system to assist a school board in securing a qualified consultant. The board must proceed carefully here and select its consultants with care. It is extremely important that the board review consultant credentials and learn of his/her prior experience in the area to be serviced. There are self-styled consultants who aggressively pursue potential employers such as school boards. This pursuit in itself can be a negative criticism. They become high-pitch salespersons with the potential danger that the service coming after the sales pitch does not match up to the board's and school district's expectation. Well-qualified, experienced consultants do not pursue; rather they are sought out. Consultants who perform quality service are known in the profession and when discreet inquiries are made across school boards and/or school districts the good one's names quickly emerge with strong endorsements from prior clients.

Locating the Quality Consultants

A board of education finding itself in the position of needing consultant help should, as previously stated, check with other school districts who have had similar needs and used consultant assistance. Boards should also communicate with the state and national school board association, state superintendent's association, national administrator organizations, universities and state education departments to gain recommendations for consultants.

Once a list of consultant names or consultant firms have been identified it is important to learn first-hand of their qualifications. Request samples of their prior work, ask for names of references from school districts where they have worked and be sure to follow-up on these references, and ask for copies of their resume to check on their relevant experience base.

Narrow the list down to two, three or four of the most promising consultants. Possibly invite them to meet with the board for a pre-interview. Pre-plan your interview to insure that you ask relevant questions and generate the necessary data to identity the most highly competent consultant to assist your district. Zero in on your questioning to get beyond any potential slick sales approach. Spell out in detail what your expectations of a consultant are, most desirably in writing. Request that the consultant prepare a proposal outlining in great detail the nature of their

activities, personnel to be used, data gathering to be made, instrumentation to be used, interviews to be undertaken, and nature of the finished product. What preliminary reports, if any, will be provided? Also included should be a detailed time-frame for the services to be provided with the corresponding cost.

After study of the proposals the board may again, if they feel necessary, invite the consultant back to discuss the proposal. If proposals were called for prior to extending an interview then by all means at this time hold interviews with those consultants whose proposals appeared promising to the board.

When a final determination has been made with a given consultant, request that the proposal be reworked into contract form. By official action of the board the contract should be signed and be entered into the official minutes of the board of education.

The consultants are now free to undertake and provide the contracted services. Someone on the board or the administrative staff should be designated as the official contract person from the district to work closely with the consultant and keep the lines of communication open.

Some portion of the fees should be designated for payment only after the final services or report have been accepted by the board of education. Along with a written final report, it is frequently desirable to request an oral report to the

board to explain in detail the process undertaking and the results of the consultant's efforts.

In Summary

Consultant assistance can be a valuable resource upon which boards of education can tap. This discussion has focused on the importance of using specialized consultant help and importantly on the need to use care in selecting a consultant of unquestionable integrity and competence. Boards should expect, and get, nothing less than the best consultant help available and insure that costs are reasonable. This can be accomplished with thoughtful planning and recruitment of competent consultant assistance.